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WP9: Communications and Dissemination

Del 9.7 - New branding guidelines incorporating bottom-up development of a 'style'

 Information Society Technologies	Project funded by the European Community under the "Information Society Technology" Programme
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Short Description:

The deliverable consists of two parts: one focussed on internal communication and research objectives, one focussing on the articulation of a clear set of messages for external dissemination. Part one offers, in contrast to most brand management practice, a bottom-up conceptualisation of branding as group identity development. It begins by reviewing literature related to branding, then assesses competing scholarly views thereon, and finally makes an argument for a conceptualisation of group identity as a complex and dynamic process. Drawing on findings from the WP6 surveys, the deliverable offers a preliminary description of the core characteristics of OPAALS's group identity as a collaborative, interdisciplinary community. Part two offers a clear and accessible outline of the core identity characteristics of the OPAALS Network of Excellence, and functions as a starting point for an evolving and adaptive identity blueprint.

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The information marked with an asterisk () is provided in order to address Recommendation n. 4 from the Year 2 review report*



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Introduction

This deliverable explores from both theoretical and applied perspectives the OPAALS approach to “group identity development”, which can be framed as a form of brand personality expression most appropriate to the unique internal and external communication needs of Digital Ecosystems (DEs). It does this in two parts. The first focussed on a theory- and research-driven justification for the particular approach taken, and aimed at elaborating on communicative best practice for digital ecosystems. The second turns the focus outwards, and articulates in clear terms the core characteristics of the OPAALS group identity as it stands, which should be understood to operate as a beginning point for further adaptation and discussion within the community.

Part One: Theoretical Framework and Empirical Insights

In order to justify why the concept of “branding” in itself is not considered appropriate to a bottom-up, collaborative digital ecosystem based on democratic principles and peer-to-peer technology, the discussion first offers a critical discussion of branding as a communicative practice. Next, “group identity” is theorised in relation to organizational theory and the complexity of digital ecosystems. Finally, the deliverable works with empirical data gathered through the linguistic research activities of Work Package 6, in order to elaborate the main emergent characteristics of OPAALS’s group identity, which are argued to form the core of an evolving and complex group identity.

Branding as a communicative practice

A short history of branding

In early consumer culture, branding was a practice linked directly to the naming of objects, with the aim of classifying and differentiating competing commodities (Douglas and Isherwood, 1979: 50). One of the earliest known brands was Wedgwood: in industrialising England of the 1700s its owners worked strategically to create a high status image for their ceramics so as to expand market share with the emerging middle classes (Arvidsson, 2006: 66). As a type of labelling of commodities, branding can thus be said to have existed even before advertising, which only came of age in 1920s Fordist America (Ewen, 1976). This was partly due to booming markets for manufactured products, and the resulting necessity to communicate to potential buyers the “special characteristics” of otherwise equivalent commodities. In this framework, branding served taxonomical, differentiating and classificatory purposes by attaching to objects identities that were memorable, positive and unique. Branding emerged as a practice of *naming* by which symbolic, semiotic or representational layers of information were twinned with material manufacture. In this sense, branding must be understood as an abstracting activity, and brands as “complicated bundles of meaning” which grow in complexity as they are inherited and shaped by new brand managers (McCracken, 2005: 179).

Brands are created and maintained through a variety of corporate communicative practices, which have evolved over the last century. These include:

- advertising;
- public relations: the practice of securing publicity for brands through editorial coverage (Ewen, 1996);

- word of mouth or undercover marketing (also known as “viral”, “guerrilla” or “stealth” marketing): the practice of creating interventions into everyday life spaces that capture consumers’ attention and highlight brands (Twitchell, 1996: 15; Bakan, 2005: 132; Arvidsson, 2006: 68);
- product placement: the practice of securing mention or visual placement of brands or branded products within other cultural products such as pop songs or films (Arvidsson, 2006: 69);
- sponsorship: the practice of paying the costs for a sporting, cultural or entertainment event in exchange for branding and naming rights at the event (Bakan, 2005: 117);
- experiential marketing: in which consumers participate in branded experiences in some way (Arvidsson, 2006: 102), and
- the increased presence of corporate design and logos in daily life (Arvidsson, 2006: 1-2).

And all of these practices work together in order to communicate the unique and compelling qualities of a brand. Branding can therefore be defined as a sophisticated multi-mediated practice, deeply implicated within consumer society, which seeks to communicate with consumers on behalf of corporate or other entities making and selling products and services on the free market. For academic or research organisations, whose central activities consist of education or research, the “products and services” provided could be considered research outputs, and are often more abstract and less clearly bounded than consumer products. For OPAALS, the central service that will be supplied to the broader public is an open source, decentralised network system; while the products/services that will be provided to the broader research community will be best practice insight and research outputs. Thus, although a digital ecosystem such as OPAALS is likely to have a different interpretation of what a product or service is, this does not mean that the imperative of creating a relationship with the public in order to communicate the benefits thereof falls away. Because the benefits of OPAALS products and services needs be communicated to various target markets in effective ways, branding should be theorized in terms of communicative practice driven by the imperatives of art, specifically the rhetorical and semiotic traditions of communications theory (see Deliverable 9.9 for a more detailed discussion).

With such semiotic origins, it is no surprise that in modern (and post-modern) societies, branding has evolved to the point that it is a practice associated with the creation of public identities for a wide variety of organizations as well as commodities. These include service-providers, public sector organizations such as universities and art galleries, and even countries or regions. In the contemporary global economy, it has become normative for any organization operating within the public eye to create a brand; some kind of public image that can communicate the values and “personality” of the organization to the wider public. Brands themselves have become immaterial commodities that represent an increasing percentage of corporations’ asset value. In this way, branding is fundamentally associated with private enterprise models that privilege profit and intellectual property. In order to explore this in more detail, it is useful to briefly review scholarly perspectives on branding.

Perspectives on branding

Scholarly reaction to the phenomenon of the brand can be loosely categorised into two opposing schools of thought: the management and the critical. These are addressed briefly in turn.

“Management” scholars study brands and branding with a view to contributing to the productivity and efficiency of the institutions that use them (e.g., Aaker, 1996; Fournier, 1998; Keller, 2003a, 2003b; Kapferer, 2004, 2006), in the larger spirit of an administrative research (Lazarsfeld, 1944) that seeks to help shape corporate communication policies. Research in this tradition considers brands and branding to be the central characteristics of the new informational economy, the manifestation of the collapse of hierarchies between high and low culture, and a liberating

movement that will lead to a consumer utopia of free choice (see for example Twitchell, 1996). Gobé (2001) argues that brands are powerful due to their ability to make “emotional” connections with consumers; McCracken (2005) extends this by arguing that corporations should incorporate anthropological research into consumer practice into their communication strategies.

The management approach is important due to its emphases on the processes implemented by corporations and the ways in which consumers engage with, understand and interpret brands and other products of corporate communication. It highlights the ways in which brands can be used to construct social identities and operate as cultural capital, for example in the formation of “brand communities” (Muniz and O’Guinn, 2001). It also introduces valuable theoretical notions into the practical work of branding, thereby potentially making it more relevant to consumers. However, management discourse can overemphasize the economic and social “magic” of branding, thereby explicitly promoting and benefiting from the profit-culture that brands evolved to support. Management discourse can also reify brands and unquestioningly accept (at times celebrate) the normative values espoused by neo-liberal society. In this way, it is inevitably aligned with market research, which seeks to understand the preferences and behaviour of consumers in order to feed that information back into the brand management process.

“Critical” scholars aim to deconstruct corporate communication so as to expose the ideologies and power structures informing brands and advertising. Scholars such as Goldman and Papsen (1996) highlight the asymmetrically powerful signifying work of brands and the disconnect between empirical reality and the hyperreal image worlds created by branding cultures. Others, such as Frank (2000) and Strangelove (2005) integrate a criticism of branding into a general disillusionment with late capitalism. The anti-advertising critiques of Packard (1960), Ewen (1976), Klein (1999) and Jhally (1987, 2006), have vigorously documented the rise, power and ubiquity of advertising in capitalist society. Critical scholars argue that brand communication impacts on individual freedom (Haug, 1986: 118): consumers receive only an impression of desire-fulfilment rather than the actual thing, a betrayal that results in the “buying-off” of consciousness.

The critical view is important because it highlights that branding is directly connected to the corporatist, capitalist mentality that drives the political economy of late modernity. It cannot be denied that branding operates in the service of profit margins, and that it thus entrenches inequality – the classic example being the ways in which Nike spends millions on its branding yet condoned the exploitation of sweat shop workers manufacturing their products (Klein, 1999). However, the critical view can be inappropriately deterministic, suggesting that the mere existence of brand messages will result in the manipulation of those that consume them. It also leaves no space for an understanding of brand communication that includes interpretive context and consumer hermeneutics. Its at times apocalyptic tone – Jhally (2006: 99), for example, describes advertising as “the most powerful and sustained system of propaganda in human history [which left unchecked] will be responsible for destroying the world as we know it” – can exclude positions that recognise the potential value of brands in adding to social and cultural capital, or acting as an fertile communicative interface between corporations and society at large. The critical position can also be easily characterised as elitist, hypocritical and “holier-than-thou”, disapproving in a high-culture sense of the “low culture” represented by consumption, advertising and branding.

Branding and digital ecosystems

Let us consider the public identity of OPAALS through the lenses of the management and critical views on branding. From the perspective of the former, it is perfectly tenable that OPAALS should

wish to establish effective communications that create opportunities for relationship development with outside actors, including the broader public. Some of the target communities with which OPAALS may wish to establish communicative relationships include: the academic research community, the open source software community, regional development communities, and the SME community. Management scholarship can assist through its administrative focus on the most efficient paradigms for creating such an identity – with a proper brand management strategy, OPAALS could emerge in the future internet society with a strong and memorable identity. Management perspectives have been, and will continue to be, very important to the communication practices of Digital Ecosystems. For example, the existing graphical identity of OPAALS (see Deliverable 9.1), as well as its website, could not have been effectively designed without a reliance on best practice principles, which are rooted in the management perspective. Nor could the OPAALS conferences and workshops aimed at engaging the academic/research community, be organised without a clear set of goals and best practices from the management school of thought. Nevertheless, the critical perspective highlights the problematic with brand management as a practice closely tied to proprietary models of information technology and communication practice. This begs the question as to when is it appropriate for an organization to create and communicate a brand, and when not. Do all organizations require brands, and if so, why? What are the alternatives to this communicative paradigm – that is, how else can an organization such as a Digital Ecosystem, with its decentralised, open source, bottom-up and democratic approach to community building, communicate its values and unique competitive advantage? It is unhelpful to suggest that OPAALS should adopt either a management or critical approach to the task of its own branding and identity management. An uncritical, purely utilitarian approach to brand management would undermine the fundamentally transformative aims of OPAALS (to create a new, non-proprietary and open-source peer-to-peer network infrastructure for information technology systems). A reactionary, blinkered and insistently critical approach to branding would write it off altogether, and disallow the potential benefits that could be gained from public identity management.

Overall, we argue that a *dialectical* and *strategic* approach should be taken to the practice of branding within OPAALS, and indeed, all digital ecosystems. A dialectical approach requires recognition that brands and branding can play an important role in lived experience and socio-cultural meaning, as well as the fact that they have a history of being manipulative and not altogether transparent. Rather than seeking to rhetorically dismantle branding, or uncritically prop up its drawbacks, a dialectical approach sees branding from a perspective that incorporates the strong elements of both the management and critical approaches and recognises and discards their weaknesses. It recognises that “brands occupy an increasingly prominent place in the managerial mind as well as the cultural landscape” and that “neither managers nor consumers completely control branding processes” (Schroeder and Salzer-Morling, 2006: 1).

A strategic approach to branding requires, we argue, two things. The first is a fundamental commitment to transparency and ethics in communication. An ethical commitment to communication practice (as discussed in D9.9) requires a theorisation of it in terms of both phenomenological and sociocultural paradigms. The former requires an indispensable respect for the interpretive repertoires and lived experiences of receivers of brand/identity messages as well as the senders; the latter an understanding that communicative practice itself produces social order and should therefore be structured in such a way as to bolster and promote ideas of respectful, shared commonality. The second thing that a strategic approach to branding requires is care in how the communicative practices of OPAALS are linguistically formulated and conveyed. In line with the socio-constructivist and linguistic research coordinates of OPAALS, it is important to remember that what we *say* we are doing in turn defines and shapes our practice. With an awareness of the complexities and contradictions inherent in branding practice, and its unavoidable roots in corporate models of communication, it is necessary and helpful to re-brand the OPAALS perspective on

branding practice itself. In other words, instead of referring to our work aimed at creating a public identity for OPAALS as branding, we refer to it as exactly what it is: **group identity development** (see D9.1 for a discussion of this in the context of OPAALS's visual identity).

Group Identity and Complex Adaptive Organizations

A digital ecosystem can be theorised as a complex adaptive system (see Deliverable 12.1). Conceptualising an organization as both complex and adaptive already provides, in large part, significant clues about that organization's identity – characteristics such as an intricate and compound structure and configuration and the ability to respond to changes in that structure, are already central to any description or definition of a digital ecosystem. Before discussing how the characteristics of complexity and adaptivity translate into the depiction of group identity, it is first important to clearly articulate and define organizational identity itself.

Organizational identity

Rooted in organizational studies, the term “organizational identity” was first coined by Albert and Whetten (2004). They take it to be a self-reflective institutional practice aimed at the characterisation of aspects of the organizational self. It is the result of asking inherently difficult questions such as “Who are we?” “What do we want to be?” They argue that an adequate statement of organizational identity points to features that (Albert and Whetten, 2004: 90):

- Are seen as the essence of the organization: the *criterion of claimed central character*;
- Distinguish the organization from others with which it may be compared: *the criterion of claimed distinctiveness*;
- Exhibit some degree of sameness or continuity over time: *the criterion of claimed temporal continuity*.

In summary, they describe organizational identity as that which is central, enduring and distinctive about an organization's character (Gioia et al, 2004: 349). This identity fulfils both inward- and outward-looking functions, and is formed by a process of ordered inter-organizational comparisons and reflections upon them over time (Albert and Whetten, 2004: 98). In specific, they note that organizational identity has crucial importance at various life-cycle stages or events (Albert and Whetten, 2004: 98-9), such as formation (the definition of niche, goals, technology, etc), loss of an identity-sustaining element (e.g., leader or founder), the accomplishment of *raison d'être*, rapid growth, or change in collective status (e.g., merger, acquisition).

Albert and Whetten (2004: 93) also argue that organizational identity is inherently multiple – that is, “there is no one best statement of identity, but rather, multiple equally valid statements relevant to different audiences for different purposes”. Organizational identity can therefore be said to emerge from the customs, beliefs, ideas and communicative practices of the members of the organization. As Hatch and Schultz (2002: 992) summarize, “identity is a relational construct formed in interaction with others”. They emphasize that organizational identity is not formed in a vacuum, but interacts with socio-cultural context more broadly. The image that external others have of an organization interacts with the internal image that the organization (and its members) have of itself. Using Mead's (1934) formulation of the I and me (in the context of anthropological identity, where the I is an individual's response to the attitudes of others and the me the set of attitudes assumed by the individual independently) Hatch and Schultz (2002: 992) argue that the organizational I is the externally defined culture of that organization, while the organizational me the internally defined reflective identity. Building upon the notions of organizational identity as defined by statements of distinctiveness and character, they conclude,

organizational identity is not only the collective's expression of organizational culture. It is also a source of identifying symbolic material that can be used to impress others in order to awaken their sympathy by stimulating their awareness, attracting their attention and interest, and encouraging their involvement and support (Hatch and Schultz, 2002: 1002).

It is clear, therefore, that there are links between organizational identity and brand management. In fact, Hatch and Schultz (2008: 68) argue that a healthy organizational identity dynamic sits at the centre of a successful corporate branding process. It is perfectly sensible to prioritise the development of a digital ecosystem identity in such a way as to be able to communicate the expression of organizational culture and values more broadly.

Complexity and dynamic identity

As we have already seen, organizational identity should be “conceived of as a multidimensional construct” (Albert and Whetten, 2004: 104). Implicit to this conceptualisation is the notion of complexity. The existence of a diversity of stakeholders¹, competing notions of value and an intricate density of structure are factors that should be taken for granted in efforts to map and define identity: the distinctive characteristics are unlikely to take shape in a one-dimensional and simple form. Neither, however, should they be considered static and durable. Correctly arguing that Albert and Whetten's claims about the durability of an organization's identity are ill founded, Gioia et al (2004) argue that organizational identity is in fact relatively dynamic. The durability of identity is only contained in the “stability of the *labels* used by organization members to express who or what they believe the organization to be”, but because meanings change, identity is in fact mutable. They “reconceptualise organizational identity as a potentially precarious and unstable notion, frequently up for redefinition and revision by organization members” (Gioia et al, 2004: 350). Developing and extending Albert and Whetten's early insights, Gioia et al (2004: 368) argue that it is crucial to “have the theoretical wherewithal to account for the dynamism of identity” – it is not a thing but a practice and a process, and it “is theoretically important to avoid its reification”. In other words, the important features of organizational identity is that it is “a negotiated, interactive, reflexive concept that, at its essence, amounts to an organizational work-in-progress” (Gioia et al, 2004: 369).

Hatch and Schultz (2002: 1004) agree that organizational identity is dynamic, arguing “the processes of identity do not end but keep moving in a dance between various constructions of the organizational self”. As a dynamic set of processes rather than an aggregation of perceptions, “an organization's self is continuously socially constructed from the interchange between internal and external definitions of the organization offered by all organizational stakeholders who join in the dance” (Hatch and Schultz, 2002: 1004). This highlights the inherent adaptivity of organizational identity, which requires consistent efforts to “balance stability and instability in identity”, in turn creating an inherent “adaptiveness, affording the organization increased capacity for change, while maintaining a continuing sense of connection to central values” (Gioia et al, 2004: 370). This too applies to the need to adapt and tailor the expression of group identity in different ways to different audiences, without losing coherence and consensus within the community.

The conceptualisation of organizational identity as something that is inherently complex, multiple and adaptive is very much in line with the ways in which the OPAALS community theorises its own structure and purpose (see Deliverable 12.1 for more detail on complex adaptive systems and

¹ In OPAALS, for example, the community is made up of a diversity of organisational actors, such as academic institutions, independent research organisations, and SMEs. This diversity is further complicated by the variety of disciplinary expertise present within consortium members. Other stakeholders include funding bodies and external actors impacted by DE research.

digital ecosystems). The focus on the reflexive and iterative means through which group identity evolves is equally crucial to note. In OPAALS, a significant focus of the research is on the linguistic, socio-constructivist processes through which digital ecosystems can be “language[d]” into reality; this takes place in Work Packages 6 and 10. Part of this research agenda involves a reflexive analysis of the ways in which members of the OPAALS community articulate their own understandings of the group identity. The next section offers a brief description of some of the results from WP6² research, which provides an initial outline of the emergent defining characteristics of the OPAALS group identity.

The empirical seeds of an emergent OPAALS’ Group Identity

Fundamentally, the creation of OPAALS’s group identity is dependent upon communication and community-building exercises, and therefore emerges from the communicative process of community members. In other words, the very process by which “organizational members understand and explain themselves *as an organization*” (Hatch and Schultz, 2002: 1000) is the root of collective identity. Such efforts at reflexivity imply a commitment to identity formation as a *process*. A significant exercise within OPAALS research has been the reflexive observation of the community formation process, which has been formalized through a longitudinal survey study administered by the partners at the University of Kassel. Consisting of four waves, the survey has aimed at recording, amongst other things, the ways in which OPAALS community members make linguistic associations with concepts central to the emerging group identity of the digital ecosystem. This exercise can be understood to relate directly to the characterization of organizational identity in that it involves “triggering or tapping into the deeply held assumptions and values of its members which then become closely associated with the identity and its various manifestations (e.g. logo, name, identity statements)” (Hatch and Schultz, 2002: 1000). In other words, the process of group identity development involves a two-way flow of meaning making – from community members who express and co-construct a sense of what it means to be part of that community, and from the organizational identity itself which embeds that identity in the organizational culture and members’ understandings of that culture. In order to provide a preliminary picture of the key terms that define OPAALS’ group identity, we will refer now to some of the findings from the second and third wave of the OPAALS questionnaire. These descriptive findings provide an aggregated, birds-eye view on linguistic associations made by community members and are rearticulated into a set of outward facing identity messages in Part Two of this deliverable.

To start with, it is important to note that 74.3% of respondents identified themselves as belonging to either the computer science (31.4%), natural science (2.9%) or social science (40%) domains, with only 17.2% of respondents self-identifying as belonging to two or more of those domains³. Considering that interdisciplinary research is the *raison d’être* of OPAALS, and the fact that most researchers consider themselves experts in one of the disciplines, it follows that the type of interdisciplinarity that OPAALS engages in will be one that is based on collaboration between researchers of different disciplines. In this sense, *interdisciplinary collaboration* is a key identity characteristic – and what this means to community members is a crucial clue to articulating this identity characteristic in more detail.

The most common words and terms associated with “collaboration” by respondents were: *cooperation* (Wave 1), *communication* (Wave 2) and *sharing* (Wave 3). The second most common

² The research results presented here were originally based in WP6, but the long-term study is now based within task 10.9.

³ Figures from Wave 3 results.

association across all three waves was the concept of *exchange*. This shows that there is a shared vision and understanding of what collaboration means – that it involves teamwork and mutual assistance, and the sharing and exchange of knowledge, understanding and resources. This can only be achieved through sustained and detailed communication – hence the clear emphasis on this practice. Other notable associations with collaboration, across all three waves, are terms such as *working together*, *cooperation*, *interaction* and *support*. Together these descriptive associations paint a high level picture of not only what collaboration means to OPAALS community members, but how the centrality of that value itself defines the group identity to a significant extent.

Interestingly, *collaboration* is an association with relatively high rankings for the originating term “community”, ranking second most frequent in both Wave 2 and 3. The close relationship between collaboration and community in the minds of OPAALS community members is a clear and direct indication of the characteristics of the group. Its identity is defined first and foremost by the concept of community. In describing what “community” means to them, respondents addressed notions such as *group*, *identity*, *sharing* and *trust*. This makes it clear that the relationship between group identity and community is not merely something deducible from theory, as described in the previous subsection of this deliverable, but also an empirical reality in the minds of the agents that come together to form a community through collaboration.

To sum up, notions of collaboration are central to the genre of interdisciplinarity research practiced by the OPAALS consortium, while the term community is the most notable term to emerge from an exploration into its group identity. It could therefore be argued that the most important emerging description of the OPAALS group identity is as an *interdisciplinary, collaborative community*. In line with the arguments made by Gioia et al, group identity development should be considered a dynamic process: these characteristics are therefore open to evolution and further articulation as the OPAALS community moves closer to the research goals that it has set itself. Furthermore, these characteristics should be considered the early indicators of the direction which the group identity may evolve, and as the core around which other, more nuanced descriptors may come to develop.

Conclusion

This section of the deliverable has argued that in the context of open-source, peer-to-peer knowledge communities such as digital ecosystems, branding is better articulated as a process of group identity development. In order to make this case, a brief history of branding was provided, as well as a review of competing scholarly views thereon. An application of this to the case of digital ecosystems revealed that a dialectical and strategic approach to branding was more appropriate. Next, it explored organizational studies in order to find useful paradigms for group identity development, and argued that organizational identity should be considered a complex, adaptive and dynamic process rather than a static thing. Following on from this, the deliverable addressed some of the descriptive results from the longitudinal linguistic association study of WPs 6 and 10. This showed that the emergent identity self-descriptions of OPAALS members show consensus in prioritising the characteristics of *interdisciplinarity*, *collaboration* and *community*. These results should be considered within the framework of considering identity as a complex, dynamic process – there is no doubt that these identity descriptions will evolve as the community changes and adapts. In the meantime, these characteristics can be considered an initial, skeletal framework for future, emergent articulations of group identity. As was noted in D9.1, identity articulation exercises can to some extent help a community to become what it wants to be by focussing member’s own attention on desired characteristics. This is particularly the case in an interdisciplinary group, comprised of heterogeneous disciplinary perspectives, which would have no coherent identity at all without a

commitment to collaboration. A group identity must operate as a *representation of shared values* – arguably, this is already demonstrated to be evident in OPAALS, and is likely to evolve to an even more detailed picture in the next phase of the project. The second part of this deliverable refocuses the discussion by providing a set of core identity characteristics that have emerged from community communications and interactions, and which can be considered a further, outward-facing articulation of the group identity.

Part Two: The core characteristics of OPAALS network identity

Our definition of Digital Ecosystems

To start with, we offer an externally oriented definition of a digital ecosystem. This should be clearly contextualised as a preliminary definition aimed at offering an overview of our subject of research for dissemination purposes, for example to SMEs, policy-makers, and the general public. A more detailed explication of the term has been published in Deliverable 12.1⁴, which will in turn be expanded in Deliverable 12.10.

A Digital Ecosystem (DE) is any autonomous, distributed, adaptive, and open source socio-technical-economic system, that fosters the emergence of properties of self-organisation, interdependence, sustainability, and scalability and is inspired by natural ecosystems, evolutionary processes, and autopoiesis. If we place less emphasis on the technical or economic dimensions, a DE can also be viewed as a collaborative community based on democratic and multi-stakeholder processes, and reflexively organized around language and language processes. It is composed of multiple, independent individuals and/or organizations (enterprises) sharing structural concerns related to the avoidance of centralized points of control or failure in the architecture and in the socio-economic organisation as assumed preconditions to facilitate and enable just socio-economic development.

The following diagram illustrates these various dimensions of the DE definition.

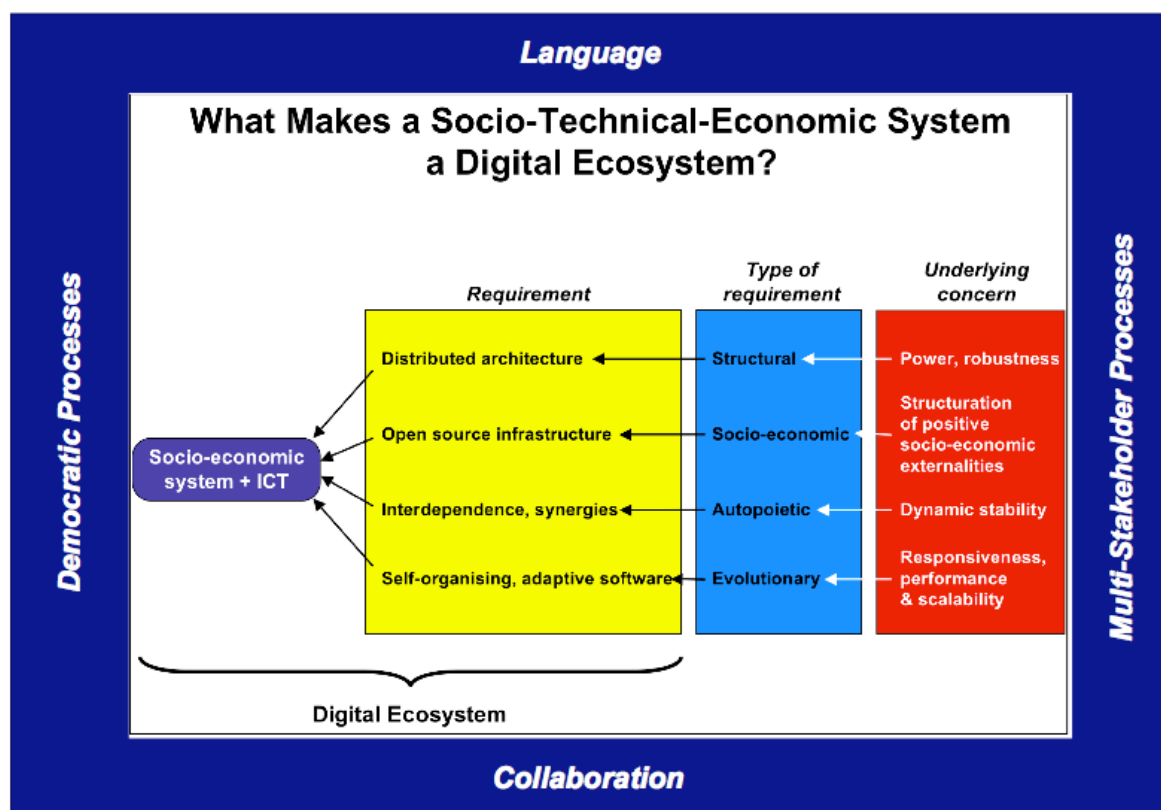


Figure 1: Graphic representation of a Digital Ecosystem

⁴ See D12.1 Chapters 4 and 5.

About this set of statements

The purpose of this series of identity statements is to help the OPAALS network to understand its own emerging nature within itself, and to communicate an identity and group personality to the external world (for example, at academic conferences, in meetings with policy makers, in presentations to chambers of commerce, in liaison with the media), and so to connect more effectively and efficiently with it. It is intended follow on from the theoretical and empirical discussion in Part One, by articulating an applied, practice-oriented set of statements which can clearly define the OPAALS identity as it currently stands to the outside world.

Here we have put into words the understandings that have emerged about the nature and ethos of the OPAALS network from its own communications, and from the linear linguistic study referred to in Part One. It is intended for the reference and debate of its current members, the guidance of future participants, and as a basis to project OPAALS identity messages externally. In an open and democratic community such as OPAALS, these statements are open for debate and discussion, which could take place in the forum of the Open Knowledge Space) and could eventually be implemented into community documents, such as a mission statement or ‘constitution’.

This document complements the graphical and visual identity, which is detailed elsewhere (see Deliverable 9.1).

Our statements of identity

We are a collaborative community

OPAALS is a network of people from organisations of many kinds, and from many locations, who are actively involved in defining the leading edge of the emerging science and technology of Digital Ecosystems. The network facilitates us collaborating, cooperating, communicating and sharing as a group and a community.

We believe that we will cause radical change

We believe that Digital Ecosystems will cause a global paradigm shift in information technology and associated social development, thus contributing to changes in both the economic and social landscape.

A child of the Internet revolution, it represents the next generation of ICT use: one which could not have been conceived without the interconnectedness of today’s society, though one which is not a linear progression, but an entirely new mixture of genes and which, with our nurture, will grow to improve the lot of humankind.

We are from different backgrounds

We are a diverse mixture, consisting mainly of researchers and economic development actors. The researchers come primarily from three established domains: computing, social science, and to a lesser number, natural science. The economic actors are mostly regionally based and concerned with ICT adoption and development in their region. This unusual mix of science and economic development is necessary since the science cannot progress without users and vice-versa.

We are open, democratic and sharing

Network membership is open and therefore constantly changing. There is no divide between inside and outside in our network. There are no fixed rules. Members may take passing interest and use our work, or become deeply involved in contributing to the science and the application. We are a meritocracy: a role in the network is whatever each member, in collaboration with others, wants and allows it to be. We are constantly developing and implementing a concept of democratic process that we all feel happy with.

We are global

Any organisation in the world may come into our network, and we have active participation internationally. We welcome the widely different perspectives this brings to the potential applications of Digital Ecosystems.

We link science with regions and end-users

By incorporating members who have regional economic development responsibilities and direct contact with small businesses and end-user communities, we are able to benefit from a panoramic viewpoint that covers everything from the theoretical basis of Digital Ecosystems to the use cases of the final application.

The Digital Business Ecosystems project pioneered the concept of Regional Catalysts who provide the direct link to end user communities and have the contact and the social capital to involve such communities in early stage use and even in research.

We are interdisciplinary

Digital Ecosystems, while physically based on Information and Communication Technology (ICT), represent far more than the interconnection of machines. There are powerful social mechanisms that cannot be avoided, as well as economic implications. There is also the natural science surrounding the phenomena of ecosystems: whether that science is biological or physical or mathematical.

We strive to be truly *inter*-disciplinary rather than simply *multi*-disciplinary. This is one of our greatest challenges - to move people to work in the spaces between disciplines rather than simply connect disciplines together with researchers remaining on their home ground.

We connect to other research

OPAALS was formed as the result of the European Union R&D Framework Programme, under a specific theme to create Networks of Excellence (NoEs). We participate in clusters of similar European projects and are open to cooperation and links with any complementary project.

We also participate in and associate with projects of international cooperation in R&D and ICT development in order to build our global knowledge and influence.

We recognise the political dimension of our work

We are apolitical in the nationalistic, governmental, or party sense. However, we recognise that Digital Ecosystems have a potential effect, and even a role in history, to change the balance of social order from globalisation involving large and centralised oligopolies, to small, decentralised, and democratic entities that have global reach. With our contributions, the inequality within current economics that enables monopolies to be created from de facto lock-in to proprietary products will shift significantly.

We work on trust

Trust forms the fundamental principle upon which everything related to OPAALS will always be based. We each have a responsibility to protect each other, as individuals and as a community. Trust and the obligations it brings come before everything else.

You can participate in the network

Participation is open and free. There are no mechanisms. We are a community and so a new member must gradually come to know and interact with that community.

Our rights within the network

We expect every participant to treat every other participant with respect and courtesy. We expect the behaviour of participants to be responsible and ethical in terms of their native culture, to be sensitive to the cultures of others, and to adapt to the emerging ethic of the group.

The rights of the network

No individual or organisation represents the whole network. We have the right to speak openly and freely to represent our own views, but we do not have any right individually to assume representation of the network to the wider world.

The graphical images and identity statements may be freely used and adapted by anyone who regards themselves as an active member of the OPAALS network, provided it is not used such that it may be construed as indicating endorsement, ownership, or formal representation of the network.

Intellectual property is important to us

We respect all intellectual property rights but believe that the existing proprietary model is flawed and that alternatives must be developed. We expect participants in the network to publish using a derivative of the General Public Licence or Creative Commons as appropriate.

We change, we adapt

Just as a Digital Ecosystem is a complex adaptive system that can change, so the OPAALS network adapts and changes. Thus there is no rigid program, no grand design. While we do not know what the future holds, we do believe we have the conceptual and practical framework of an organizational identity to be ready to embrace it.

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